

APPLICATION FOR RECORDS DISPOSITION STANDARD

INSTRUCTIONS: Prepare in duplicate and forward to the Records Management Analyst, Management Systems Division

3. Dept. Division, Subdivision & Administering Office Address Metropolitan Rapid Transit Authority Department of Planning and Public Affairs Division of Planning and Marketing 2200 Peachtree Summit Building 401 West Peachtree Street NE Atlanta, Georgia 30308		FOR RECORDS MANAGEMENT DIVISION USE Date Received Application No. Date Completed MAR - 2 1978 75-7-A MAR 20 1978	
4. Person to Contact Bruce B. Emory		5. Working Title Manager of Transit Systems Planning	6. Telephone Number 586-5161
7. Action Requested a. <input type="checkbox"/> Establish Retention Schedule; record will continue to accumulate. b. <input type="checkbox"/> Dispose of present accumulation; no further accumulation anticipated. c. <input checked="" type="checkbox"/> Amend Application No. 75-7 Check One: <input checked="" type="checkbox"/> Change; <input type="checkbox"/> Supersede; <input type="checkbox"/> Void			
8. Dates of Series Earliest Latest 1972 present		9. Records Series Title (followed by title used in office; if different) Planning Project Source Documents File	
10. Division and Office Function What is the function of the Division and the Office in which this record series is created? <div style="text-align: center; padding: 20px;">see attached</div>			
11. Record Series Description This file contains the following documents (include form numbers and titles, if any): Attach samples of the file. Documents relating to: Transportation planning and marketing projects Included are: reports, working papers, computer printouts, questionnaire forms, tab cards, correspondence, working tables, study notes, punch cards File is arranged: by project name			
12. Monthly Reference Rate How often are records referred to which are: One to six months old _____ ; Seven to twelve months old _____ ; Thirteen to twenty-four months old _____ ; twenty-five months and older _____ ?			
13. Annual Rate of Accumulation of Records Letter-size drawers _____ ; Legal-size drawers _____ ; Shelves 3 _____ ; Other (specify) _____			

YES	NO	14. Questionnaire (Place an "X" in the proper column)
X		a. Is this the official copy of the series? If not, where is it?
	X	b. Does the series contain confidential information requiring security handling? If yes, cite law or regulation.
	X	c. Is this a vital record?
X		d. Does this series have historical or long term research value? possible historical and/or research value
		e. When one or two documents in the file make it necessary to keep the entire file for a long period, could these documents be scheduled separately?
	X	f. Is the information contained in this series ever published? If yes, attach copy.
X		g. Is the information contained in this series ever analyzed and/or recorded in a summarized report? If yes, attach copy. reports files with MARTA and State libraries
		h. Is there a duplication of this series in your office, or in another office or agency? If yes, where?
	X	i. Is this series (or a major portion of it) regularly microfilmed?
	X	j. Does the record series result in a computer printout?

15. Retention Requirements

The following requires the series to be kept:

a. State Law	_____ years.	d. Audit period	_____ years.
b. Statute of limitation	_____ years.	e. Administrative need	3 _____ years.
c. Federal law	_____ years.	f. Federal retention instructions	3 _____ years.

Attach copy or excerpt of laws or regulations. Explain administrative need.

Urban Mass Transportation Administration External Operating Manual III.D.p41

16. Approved Disposition Instructions

This agency recommends that the file series be cut off at the end of each:

☐ Calendar Year; ☐ Fiscal Year; ☒ Other **completion of project** then,

- ☐ Hold in the current files area _____ month(s) _____ year(s); then
- ☒ Transfer to local holding area; hold **10** year(s); **then**
- ☐ Transfer to State Records Center; hold _____ year(s); then
- ☒ Destroy.
- ☐ Transfer to State Archives for permanent retention.
- ☐ Other (Specify)

These instructions apply to all prior and future accumulations of the series.

(Indicate briefly rationale for recommendations above/or write additional remarks):

17. APPROVALS

Approved	Department Records Management Officer	Date	Approved	Legal Counsel	Date
	<i>Bruce G. Gorman</i>	2/22/78		<i>Wayne P. Womack</i>	2/24/78
Approved	Division Head/Designee	Date	Approved	Division of Audit	Date
	<i>John W. Bates</i>	2/22/78		<i>J. Smith</i>	2/24/78
Approved	Department Head/Designee	Date	Approved	Department of Archives and History	Date
	<i>James H. Hurd</i>	2/23/78		<i>Carolee Hurd</i>	3-16-78
Approved	Records Management Analyst	Date	Approved	MARTA Management Advisory Committee	Date
	<i>Douglas M. Hurd</i>	2/23/78			

EXHIBIT I

Division of Planning and Marketing Functions and Responsibilities

1. Provide for coordination of MARTA's transit development program with all regional and local governmental planning efforts which involve transportation services, including the Atlanta Regional Transportation Planning Program (ARTPP): preparation of the regional Transportation Improvements Program and its Annual Elements; and Transportation System Management Plan.
2. Support as required the Department of Transit Operations in planning for rail and bus operations, specifically feeder bus routes.
3. Provide assistance to the Department of Transit System Development in rail facility design, particularly through review of the preliminary design of stations and lines to ensure their compatibility with local development plans and proper function in the system.
4. Facilitate progress in system development through execution of required environmental, historical, and archaeological analyses and procurement of necessary approvals.
5. Develop and maintain long-range plans for extensions to the MARTA system; perform analyses to determine appropriate extensions for rail transit service.
6. Evaluate alternatives to approved routes and station locations in terms of service, cost, and environmental impact.
7. Determine through studies location of future transit corridors and methods for protecting right-of-way in such corridors and means for capture of land values thus created.
8. Develop and implement transit marketing programs including accomplishment of necessary research and analyses of passenger characteristics and attitudes, for recommendations on new services and revisions to existing ones, and for implementation of promotional package to enhance the use of all Authority services.
9. Perform special studies and research as appropriate or directed for the support of any units of the Authority.

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marla

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3. Dept., Division, Subdivision & Administering Office Address Department of Staff Services Division of Planning Research & Development Section Suite 1200, 100 Peachtree		FOR RECORDS MANAGEMENT DIVISION USE Date Received Application No. Date Completed FEB - 3 1975 75-7 2/6/75	
4. Person to Contact Joseph P. Byrd IV		1. Application Date 1-21-75	2. Dept. Application No.
5. Working Title Senior Planner - Research & Development		6. Telephone No. 586-5027	

7 ACTION REQUESTED

☒ ESTABLISH DISPOSITION STANDARD.
RECORD WILL CONTINUE TO ACCUMULATE.

☐ DISPOSE OF PRESENT ACCUMULATIONS.
NO FURTHER ACCUMULATION ANTICIPATED

8. Earliest & Latest Dates of Series 11/72 to present	9. Exact Series Title Planning Division Research Project File
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10. What is the function of the office in which this record series is created?

The Division of Planning provides input into the design process of the adopted rapid transit system and assists and supports the Atlanta Regional Commission in its regional development and transportation planning program. To accomplish the above, the Division is involved in research activities to design, develop, test and refine procedures and methods. The division also advises the Assistant General Manager for Staff Services, the General Manager, and other Authority Staff in the development and application of policies and procedures relating to the long-range program of the Authority. These activities include close coordination and cooperation with other planning agencies and the community relations staff.

11. This file contains the following documents (include form numbers and titles, if any, and file arrangement):

Documents relating to: Research Projects

Included are: Questionnaire Forms, Computer Printouts, Tab Cards, Correspondence, Working Tables, Study Notes, Study Design

File is arranged: Alphabetically by project, thereunder by survey number, by calendar year.

ATTACH SAMPLES OF THE FILE

12. Equipment Occupied	No. of Drawers	Cu. Ft. of Records	Annual Rate of Accumulation	No. of Drawers	Cu. Ft. of Records
Letter-size File Drawers				4	8
Legal-size File Drawers	4	8	Floor Space Occupied (Square Feet)	In Office(s)	In Storage Area(s)
				7	
				This Year's	Last Year's
			AVERAGE DAILY REFERENCES		
				1	

QUESTIONNAIRE Place an "x" in the proper column. If answer is "YES," please explain

YES NO

13. ☒ ☐ Is this the Record Copy of the series?

14. ☒ ☐ Is there a duplication of this series in another office or agency?

*MARTA Library for Printout summaries

15. ☒ ☐ Is the information contained in this series ever summarized or published? Attach copy.

Copy attached (SAMPLE)

16. ☐ ☒ Does the series contain classified information requiring security handling?

17. ☐ ☒ Does the series initiate, amend or terminate agency policies and procedures?

18. ☒ ☐ Could the function be performed if the files were lost or destroyed?

19. ☐ ☒ Is the series (or major portion of it) regularly microfilmed? If yes, why?

20. ☒ ☐ Does the record series provide data as input to an EDP file?

21. ☒ ☐ Does the record series contain documentation produced as EDP printout?

22. ☐ ☒ Has the Federal Government issued instructions governing retention/disposition of these files?

23. ☒ ☐ Will there be a need for these records 10, 15 years from now? If yes, what?

*Additional Research

24. REQUIREMENTS. The following requires the files to be kept 10 years:

a. ☐ STATE LAW b. ☐ STATUTE OF LIMITATION c. ☐ AUDIT PERIOD d. ☐ FEDERAL LAW e. ☒ ADMINISTRATIVE DECISION f. ☐ HISTORICAL VALUE
(Cite Law, Statute, or other reason for the retention requirement)

By: John W. Bates, Manager of Research & Development

25. AGENCY RECOMMENDATIONS: This agency recommends that the file series be cut off at the end of each

☒ CALENDAR YEAR ☐ FISCAL YEAR ☐ Other

☒ Hold in the current files area 1 month(s)/ 1 year(s):

☒ Transfer to ☒ State Records Center ☐ Local Holding Area; hold 9 year(s):

☒ Destroy.

☐ Transfer to Archives for permanent retention.

☐ Destroy immediately after cut-off.

☐ Other: (Specify)

(Indicate briefly rationale for recommendations above, or write additional remarks):

Four copies of all completed research reports are to be transferred to the MARTA Library.

26. APPROVALS

Approved	Department Records Management Officer	Date	Approved	Legal Counsel	Date
<i>J. W. Bates</i>		1-23-75	<i>Wayne PCrowley</i>		1-29-75
Approved	Division Head / Designee	Date	Approved	Division of Audit	Date
<i>Manuel Padua</i>		1/23/75	<i>William P. Caravita</i>		1-31-75
Approved	Department Head / Designee	Date	Approved	MARTA Management Advisory Committee	Date
<i>J. W. Bates</i>		1-23-75	<i>John W. Bates</i>		2/2/75
Approved	Records Management Analyst	Date	Approved	Department of Archives and History	Date
<i>Dwight M. Hearn</i>		1-23-75	<i>Carroll Hart</i>		2-6-75

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7. ACTION REQUESTED <input checked="checked" type="checkbox"/> ESTABLISH DISPOSITION STANDARD; RECORD WILL CONTINUE TO ACCUMULATE. <input type="checkbox"/> DISPOSE OF PRESENT ACCUMULATIONS. NO FURTHER ACCUMULATION ANTICIPATED.							
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						This Year's	Last Year's
						Preceding Year's	All Prior Year's
						AVERAGE DAILY REFERENCES 1	

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Approved Department Head/Designee, <u>1-23-75</u>	Approved MARTA Management Advisory Committee
Approved Records Management Analyst, <u>1-23-75</u>	Approved Department of Archives and History, <u>Carroll Hart</u> <u>2-6-75</u>